







Selecting a Web Intelligence report panel

Procedure

1. Start the transaction using the menu path or transaction code.

Home Page of InfoView

Go directly to:

-  [Document List](#)
-  [My Favorites](#)
-  [My Inbox](#)
-  [My Preferences](#)
-  [Information OnDemand Services](#)
-  [Help](#)

InfoView

2. Click **My Preferences**.

In InfoView, you can view the panels available to you for creating and editing Web Intelligence documents.

The InfoView Preferences page allows you to modify Web Intelligence settings.

Selecting a Web Intelligence report panel

Internal

▼ **General**

InfoView Start Page:

☒ Home

☐ My InfoView

☐ Favorites

☐ Inbox

☐ Folder: (unspecified)

☐ Category: (unspecified)

☐ Dashboard: (unspecified)

☐ InfoView Page Layout: (unspecified)

Document Navigation View:

☒ Folder

☐ Category

Set the number of objects (max.) per page:

Document List Display:

☒ description

☒ owner

3. Click the arrow before **General ▼**.

This is the InfoView Preferences page. The page is organized into different drop-down sections that allow you to view and modify settings concerning InfoView and Web Intelligence.

Internal

▼ **General**

► **Change Password**

► **Web Intelligence**

► **Desktop Intelligence**

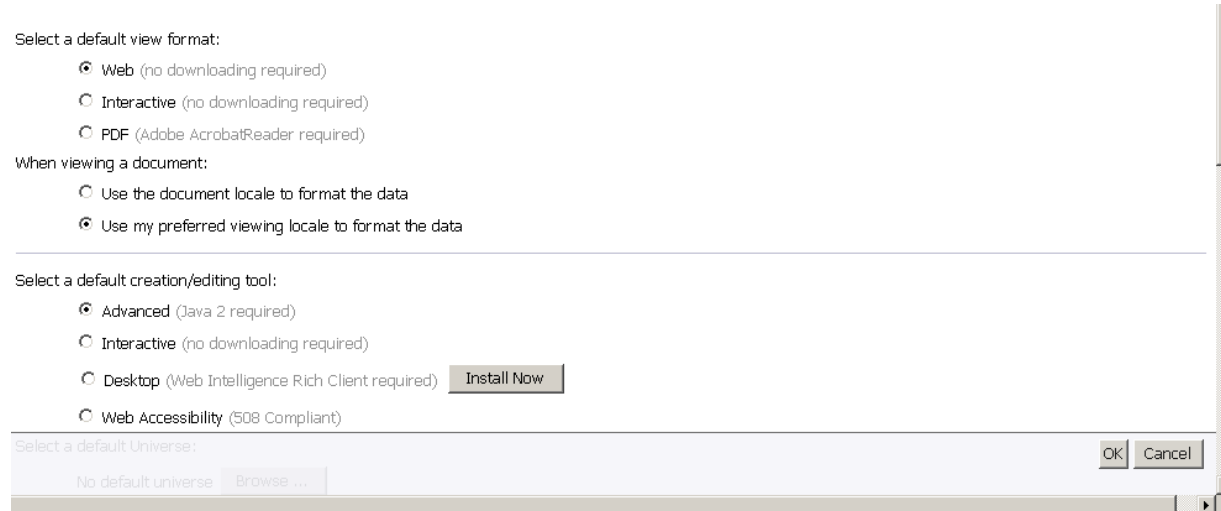
► **Crystal Reports**

► **Dashboard and Analytics**

Selecting a Web Intelligence report panel

- Click the arrow before **Web Intelligence** .

Internal



Select a default view format:

- ☒ Web (no downloading required)
- ☐ Interactive (no downloading required)
- ☐ PDF (Adobe AcrobatReader required)

When viewing a document:

- ☐ Use the document locale to format the data
- ☒ Use my preferred viewing locale to format the data

Select a default creation/editing tool:

- ☒ Advanced (Java 2 required)
- ☐ Interactive (no downloading required)
- ☐ Desktop (Web Intelligence Rich Client required)
- ☐ Web Accessibility (508 Compliant)

Select a default Universe:

No default universe

- Press [Enter] to continue.

In the Select default creation/editing tool section of the page, you can see that the Advanced option is selected by default.

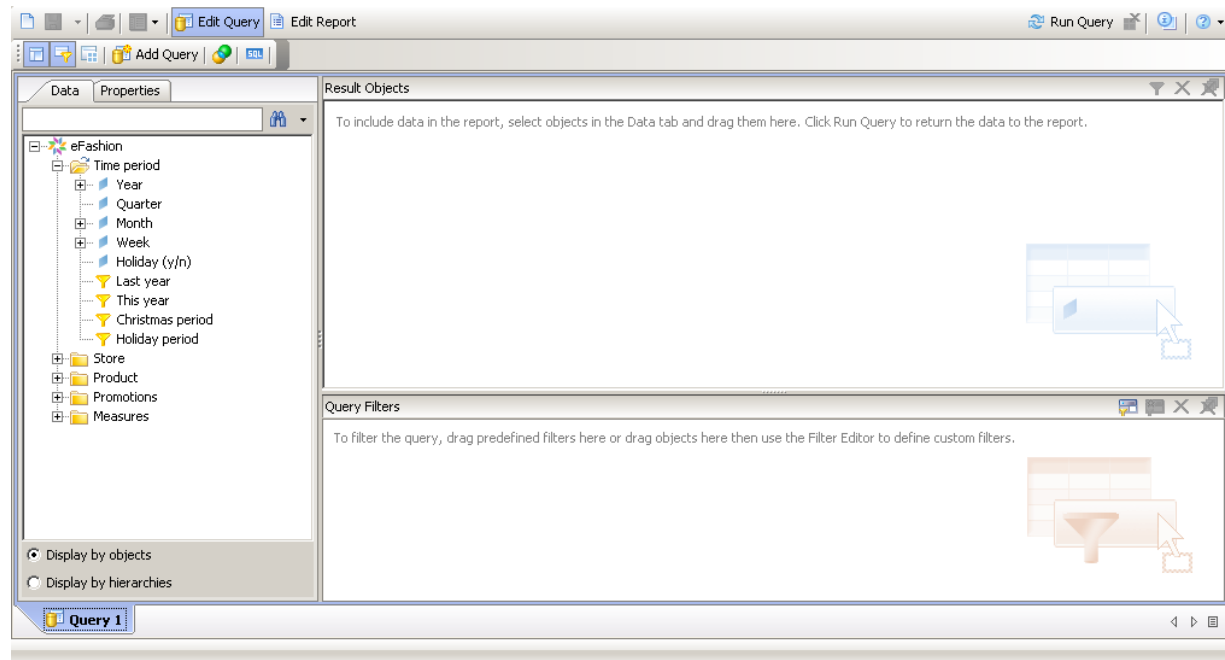
In Web Intelligence, there are for options provided for creating and editing Web Intelligence documents. Your BusinessObjects System Administrator may decide which of these panels you have the right to use. Or you may be able to select the panel yourself.

The Advanced, the Interactive, the Desktop, and Web Accessibility options are described in this lesson. The Desktop option, or Web Intelligence Rich Client, is used in this course.

Press **[Enter]** to continue.

Selecting a Web Intelligence report panel

Web Intelligence Java Report Panel



6. Press [Enter] to continue.

The Advanced option has a drag and drop interface that allows you to create sophisticated documents containing multiple reports, tables, and charts. You can create complex filters, custom formulas, and highly formatted documents with personalized page layouts.

A Java applet is downloaded the first time this panel is used from InfoView.

If advanced query and formula features are required, it is recommended that you use the Advanced option.

Press **[Enter]** to continue.

Selecting a Web Intelligence report panel

Internal

Select a default view format:

- ☒ Web (no downloading required)
- ☐ Interactive (no downloading required)
- ☐ PDF (Adobe AcrobatReader required)

When viewing a document:

- ☐ Use the document locale to format the data
- ☒ Use my preferred viewing locale to format the data

Select a default creation/editing tool:

- ☒ Advanced (Java 2 required)
- ☐ Interactive (no downloading required)
- ☐ Desktop (Web Intelligence Rich Client required) Install Now
- ☐ Web Accessibility (508 Compliant)

Select a default Universe:

No default universe Browse ... OK Cancel

7. Click the **Interactive** option.

Now let's look at the Interactive option.

Title zone

Universe

Enter your search pattern here 

- efashion
 - Time period
 - Year
 - Quarter
 - Month
 - Week
 - Holiday (y/n)
 - Last year
 - This year
 - Christmas period
 - Holiday period
 - Store
 - Product
 - Promotions
 - Measures

☒ Display by objects
☐ Display by hierarchies

Result Objects

To include data in reports, select objects on the Universe pane and add them here by clicking the arrow or using drag-and-drop. Click Run Query to return the results.

Query Filters

To filter the query, select predefined filters or objects on the Universe pane and add them here by clicking the arrow or using drag-and-drop. Select Filter to specify the values you want returned to reports or select Prompt to define a message so users can select values of their choice.

Selecting a Web Intelligence report panel

8. Press [Enter] to continue.

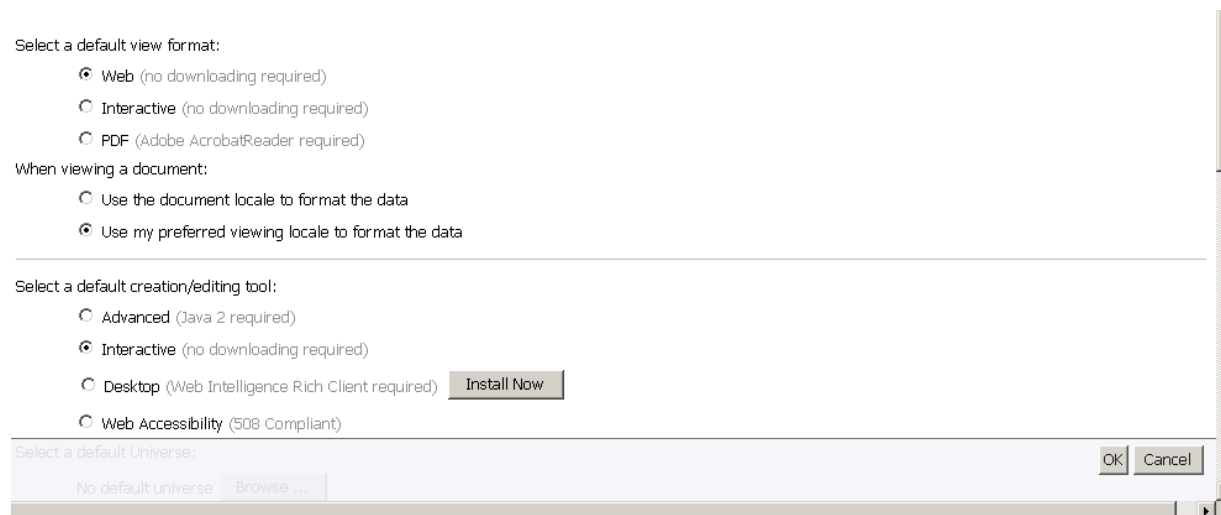
The Interactive option does not provide as many features for formatting and manipulating data as the Advanced option, but you can apply simple query filters and combine queries.

Once you have run the query and created the document, you can use all the advanced reporting and formatting features available in the Interactive View mode.

There is no need to download additional software to your workstation in order to use this panel.

Press **[Enter]** to continue.

Internal



The screenshot shows a dialog box titled "Internal" with the following sections:

- Select a default view format:**
 - ☒ Web (no downloading required)
 - ☐ Interactive (no downloading required)
 - ☐ PDF (Adobe AcrobatReader required)
- When viewing a document:**
 - ☐ Use the document locale to format the data
 - ☒ Use my preferred viewing locale to format the data
- Select a default creation/editing tool:**
 - ☐ Advanced (Java 2 required)
 - ☒ Interactive (no downloading required)
 - ☐ Desktop (Web Intelligence Rich Client required) **Install Now**
 - ☐ Web Accessibility (508 Compliant)
- Select a default Universe:**
 - No default universe
 - Browse ...

At the bottom right, there are "OK" and "Cancel" buttons.

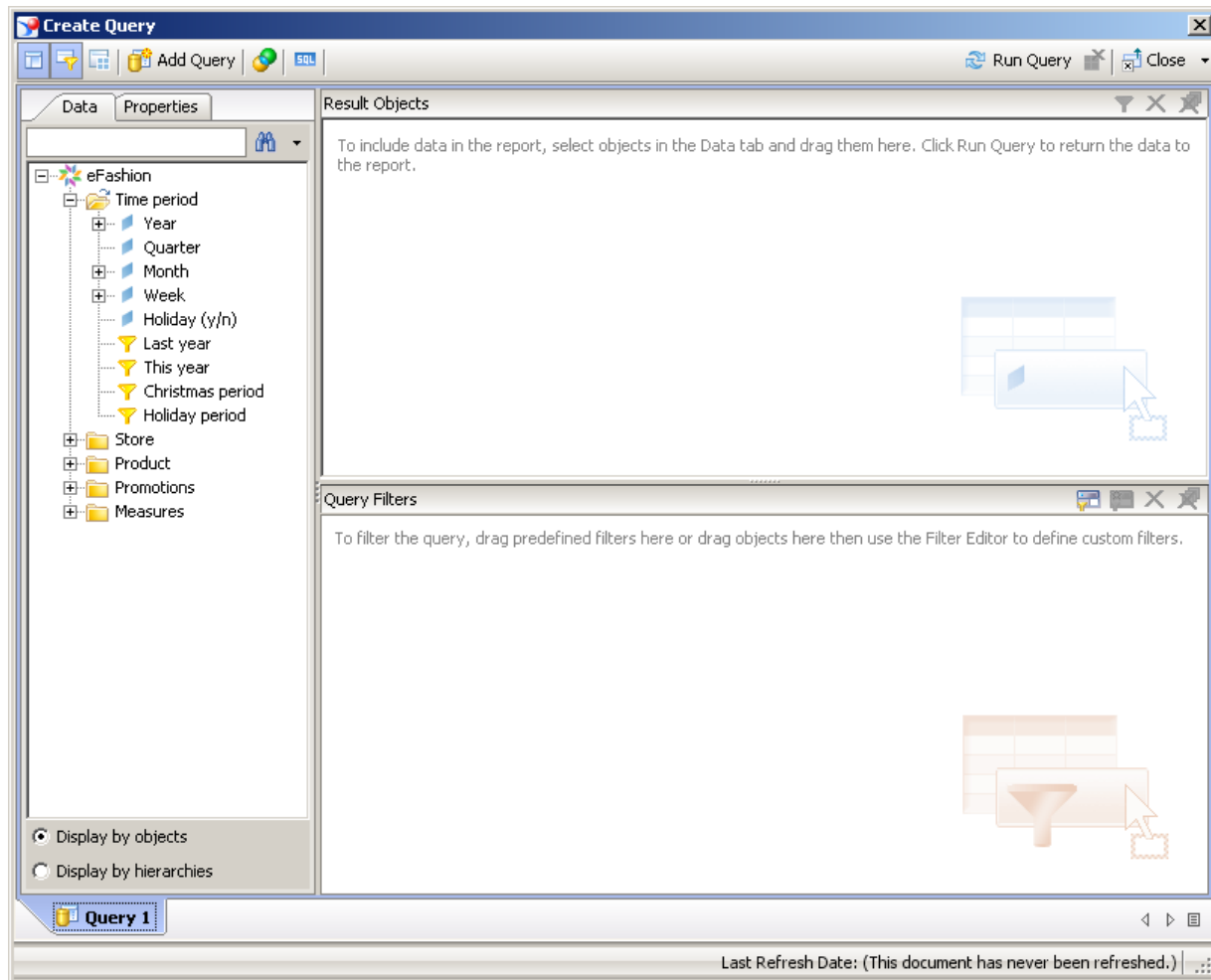
9. Click the **Desktop** option.

Now let's look at the Desktop option which opens the Web Intelligence Rich Client.

Note: If the Web Intelligence Rich Client has not been installed to your computer, you may need to click Install Now.

Selecting a Web Intelligence report panel

Create Query



10. Press [Enter] to continue.

The Web Intelligence Rich Client runs on your desktop.

It has a drag and drop interface that allows you to create sophisticated documents containing multiple reports, tables, and charts. You can create complex filters, custom formulas, and highly formatted documents with personalized page layouts.

Press **[Enter]** to continue.

Selecting a Web Intelligence report panel

Internal

Select a default view format:

☒ Web (no downloading required)

☐ Interactive (no downloading required)

☐ PDF (Adobe AcrobatReader required)

When viewing a document:

☐ Use the document locale to format the data

☒ Use my preferred viewing locale to format the data

Select a default creation/editing tool:

☐ Advanced (Java 2 required)

☐ Interactive (no downloading required)

☒ Desktop (Web Intelligence Rich Client required) [Install Now](#)

☐ Web Accessibility (508 Compliant)

Select a default Universe:

No default universe [Browse ...](#)

[OK](#) [Cancel](#)

11. Click the **Web Accessibility** option.

Now let's look at the Web Accessibility option.

Internal

Universe Objects

- [-] eFashion
 - [-] Time period expanded
 - [+] Year
 - [+] Quarter
 - [+] Month
 - [+] Week
 - [+] Holiday (y/n)
 - [+] Store
 - [+] Product
 - [+] Promotions
 - [+] Measures

Result Objects

>> <<

Scope of Analysis None

Query Properties

12. Press [Enter] to continue.

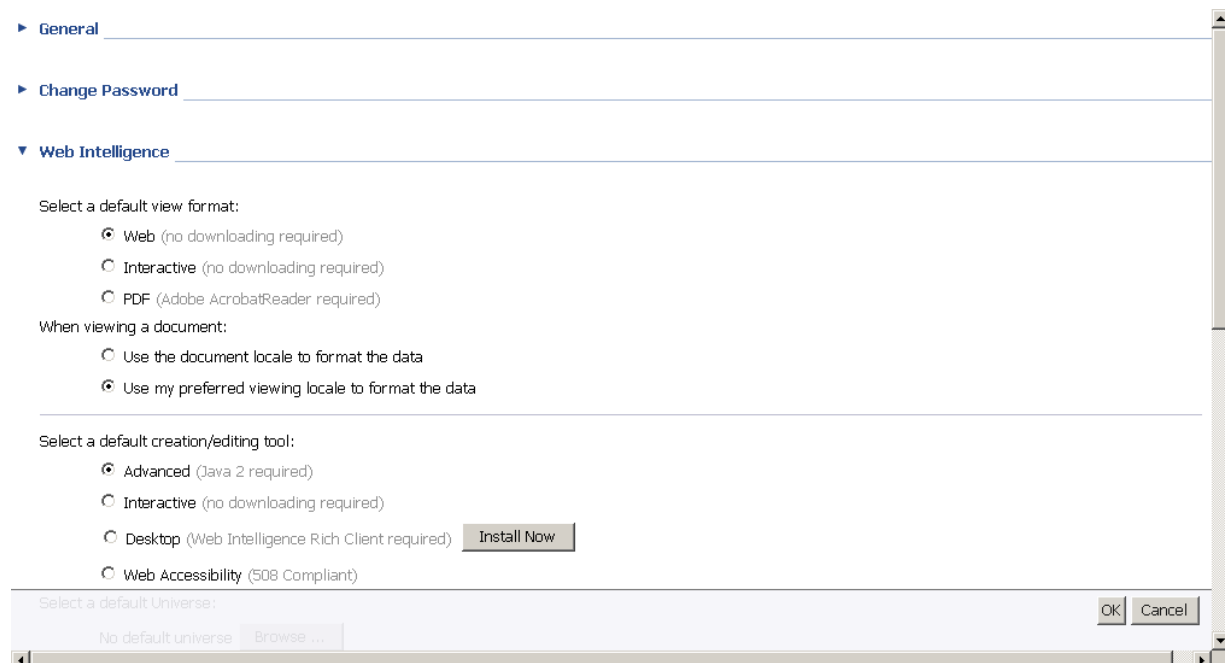
Selecting a Web Intelligence report panel

The Web Accessibility option is similar to the Interactive option in that no software is downloaded to your workstation.

This panel offers more reporting features that are available in the Interactive option, but it is a simplified interface, which is essentially made available for developers who want to deploy a customized version of Web Intelligence.

Press **[Enter]** to continue.

Internal



Internal

► General

► Change Password

▼ Web Intelligence

Select a default view format:

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- ☐ Interactive (no downloading required)
- ☐ PDF (Adobe AcrobatReader required)

When viewing a document:

- ☐ Use the document locale to format the data
- ☒ Use my preferred viewing locale to format the data

Select a default creation/editing tool:

- ☒ Advanced (Java 2 required)
- ☐ Interactive (no downloading required)
- ☐ Desktop (Web Intelligence Rich Client required) [Install Now](#)
- ☐ Web Accessibility (508 Compliant)

Select a default Universe:

No default universe [Browse ...](#)

[OK](#) [Cancel](#)

13. Click **OK**.

Once you select the report panel that is most appropriate for your needs, you must remember to validate your choice.

Clicking **OK** will validate the change and return you to the Infoview home page.